REQUEST FOR PROPOSALS

EVALUATION OF THE IMPACT OF THE LIVING LEGACY TRUST

October 3rd, 2003

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1.0 Introduction to the Living Legacy Trust

1.1 Mandate and Scope of the Living Legacy Trust

The Living Legacy Trust ("the Trust") is a $30 million fund established in March 1999 by the Ontario Provincial Government to invest in natural resource management projects in northern Ontario by facilitating "*partnerships and cooperation amongst stakeholders with interests in the sustainable use and conservation of Ontario's natural resources*".

With a five-year mandate to March 31st, 2004, the Trust invests in projects that advance sustainable natural resource management and bring environmental, economic, recreational and social benefits to the people of Ontario by supporting projects that extend resource management practices. This is achieved through funding proposals with a primary focus on the following:

- investing in opportunities to enhance sustainable resource management on Crown Land in northern Ontario and go beyond what industry and government have traditionally accomplished, and/or

- assisting Ontario's forestry industry to deal with some of the transitional challenges that it faces as a result of the land use planning defined under "Lands for Life".

The Living Legacy Trust was established with the purpose of "*mitigating impacts resulting from the implementation of the Lands for Life recommendations, as well as providing better information for sustainable resource management.*" The Lands for Life land use planning process was based on public consultations carried out by citizen Round Tables held in three planning regions: Boreal West, Boreal East, and Great Lakes-St. Lawrence. The provincial government later held discussions with representatives of both the forest industry and the conservation community regarding possible strategies to enhance the recommendations of the Round Tables. Out of these discussions came the development of the Ontario Forest Accord and the Living Legacy Trust.

Beyond simply allocating funds to relevant projects, the Living Legacy Trust was intended to encourage extra value through strengthened and expanded partnerships in resource management. It was thought that projects modeled on a collaborative approach would result in, or accelerate, improvements to public policy, changes in resource management practices, scientific breakthroughs, economic development, and institutional development, for example. Under the direction of a board of directors representing different sectors within the natural resource management community, and the public at large, the Living Legacy Trust purpose was to be achieved with a focused, five-year term.

The Trust established the following nine granting programs and targeted allocations:

Improved Forestry Management

1. Loss of use of roads and bridges ($1M)
2. Multi-purpose access roads ($5M)
3. Far North forestry development ($3M)
* 4. Forest science data collection and research ($7M)
5. Forest employment opportunities ($5M)
6. Value-added wood manufacturing ($.5M)

Improved Fish and Wildlife Management

* 7. Scientific data on fish and wildlife ($3.5M)
* 8. Ecological approach to fish and wildlife management ($2M)
9. Benefiting northern community through fish and wildlife resources ($1.5M)

(denotes science-related funding programs, which are subject to scientific peer review)*

Stated objectives for each of the nine programs are contained in the Appendix of this Request for Proposals (RFP).

Funding applications were accepted from Ontario-based individuals, private businesses, colleges, non-government organizations, and municipal and federal governments with an interest in natural resource management and science. Eligibility for funding is limited to projects that encompass Ontario's Crown land areas north of the southern boundary of the Precambrian Shield. Funded projects are intended to serve as models of excellence in forestry, fish and wildlife management practices.

An independent volunteer Board of Directors representing various stakeholder groups makes all funding decisions. The following chart summarizes the total number of proposals received and grants awarded by the Trust for each of the nine granting programs since it began funding projects in 2000.

	Granting Program	No. Proposals Received	No. Grants Awarded	Total $ Value	
				Amount Requested	Amount Granted
Improved Forestry Practices and Management:					
1	Loss of use of roads and bridges	5	1	2,149,052	57,847
2	Multi-purpose access roads	17	8	5,070,649	1,351,357
3	Far North forestry development	22	13	7,618,439	3,932,712
4	Forest science data collection/research	87	41	22,053,828	10,463,904
5	Forest employment opportunities	64	48	8,238,548	5,918,788
6	Value-added wood manufacturing	5	3	916,000	531,000
Sub-total Forestry:		*200*	*114*	*$46,046,516*	*$22,255,608*
Improved Fish and Wildlife Access and Management:					
7	Scientific data on fish/wildlife	59	17	14,923,511	3,751,313
8	Ecological approach to fish/wildlife	55	18	12,868,018	3,506,144
9	Benefiting northern communities	47	25	3,194,770	1,589,381
Sub-total Fish/Wildlife:		*161*	*60*	*$30,986,299*	*$8,846,838*
Total		**361**	**174**	**$77,032,815**	**$31,102,446**

The following table outlines the number of projects funded in each of the four granting years:

Year	# Grants Awarded
2000	10
2001	43
2002	55
2003	66
Total	* 174

** to date. 23 grants have been closed*

Additional information on the Trust and its funded projects is available on its website www.livinglegacytrust.org.

1.2 Structure of the Trust

Through a Trust Agreement with the provincial Minister of Natural Resources, the Trust's assets are managed by an independent Board of Directors representing a partnership of the forest industry, environmental organizations, academia and the government. The following groups are represented on the Board:

- Association of Municipalities of Ontario,
- World Wildlife Fund Canada,
- Lakehead University,
- Ontario Lumber Manufacturers' Association,
- Federation of Ontario Naturalists,
- Ministry of Natural Resources, and
- Ontario Forest Industries Association.

In addition to a representative from each of these seven organizations, there are four Members at Large appointed by the Minister of Natural Resources. The Board operates with three committees: the Executive Committee comprised of the Chair, Vice-Chair, Secretary/Treasurer, and Executive Director; the Value-Added Committee; and the Science Advisory Committee.

The number of full-time staff has recently been reduced from five to three and presently include the Executive Director, Program Analyst, and Administration and Grants Information Coordinator.

2.0 Purpose and Objectives of the Evaluation

2.1 Study Purpose

The purpose of this assignment is to assess the impact of the Living Legacy Trust. To achieve this, the Board of Directors has decided to engage a consultant to undertake a third party evaluation regarding the extent to which the Trust has fulfilled it purpose and mandate, as well as to assess the broader, longer-term impact of the collaborative approach modeled by the Trust, and to identify key factors leading to its successes and failures.

Results of this assignment will provide the Board of Directors with an objective third party opinion that the Board of Directors will share with senior decision makers in the provincial government, including the Premier's Office, as well as key stakeholders.

2.2 Study Objectives

Within the context of the study purpose, the objectives of the assignment are stated as follows:

1. To evaluate the extent to which the Trust has fulfilled its mandate, satisfied its purpose, and achieved (or is likely to achieve) results.

2. To assess the impact of the Trust on environmental, economic and social developments in natural resource management.

3. To evaluate the Trust's success in communicating project results and transferring knowledge gained to its constituency.

4. To evaluate the effectiveness of the governance and financial management framework as conceptualized and implemented by the Board of Directors.

5. To identify elements of the Trust model which are considered to be material to the success of the undertaking and which may be emulated in any future undertakings.

3.0 Study Approach

Consultants are requested to obtain and utilize input received through confidential interviews held with representatives from all stakeholder groups (i.e., participants and beneficiaries), to include as a minimum: grantees, Trust Board members and senior staff, officials from the Ministry of Natural Resources, the forest industry, academia, and conservation NGOs.

To assist in data collection and analysis, consultants will be provided access to Living Legacy Trust documents and files as required.

4.0 Reporting Relationships

The project will be managed by the Trust's Executive Director, Ms. Karan Aquino. The Board's Executive Committee will serve as the Project Steering Committee, with responsibility for recommending to the Trust's Board of Directors the consultant who should undertake the project. The Trust's Board of Directors will have responsibility for selecting the consultant and for receiving the final report.

5.0 Project Deliverables

The consultant will be expected to prepare and present for review and discussion the following documents:

- A detailed work plan outlining evaluation methodology, key activities, timeframes, responsibilities, and deliverables.
- A summary interim report outlining study results to date by February 25th, 2004.
- A draft final report by May 7th, 2004.
- A final report (including Executive Summary) by May 31st, 2004.
- A draft presentation to be utilized by Board members in formal presentations outlining the results of the project.

6.0 Qualifications of the Consultant

The consultant selected to undertake the assignment should be proficient in the following areas:

- In-depth knowledge and recent experience in evaluating programs of a similar scope and size, and conducting impact assessments.
- In-depth knowledge of and experience in the natural resources sector in Ontario (in particular, forestry, fish and wildlife).
- In-depth knowledge and understanding of current issues faced by industry and government in developing and implementing strategies to ensure the long-term sustainability and conservation of Ontario's natural resources.
- An understanding of the dynamics of public-private sector partnerships, including those with government and academia.
- General knowledge of public grant programs and the process utilized to identify and manage successful projects.
- Strong analytical, interpretation, writing, group facilitation, and presentation skills.
- Proven ability to work and communicate effectively with senior public officials.

The consultant's proposal should include the names of three references for whom the consultant has recently undertaken assignments of a similar size and scope.

7.0 Project Timeframe

The anticipated start date for the assignment is November 17th, 2003. The project must be completed by May 31st, 2004.

8.0 Proposal Preparation and Submission

8.1 Proposal Format

Proposals should include the following information in this order:

a) Title/cover page, including the name of the project, the legal name of the submitting organization, and the name, address, telephone and facsimile number, and e-mail address of a contact person(s) for the Respondent.
b) Table of contents, including any attachments.
c) Understanding of the assignment (e.g., background, scope, purpose, objectives, issues).
d) Project work plan by phase, including methodology, key activities, timeframe, and deliverables. As a minimum, the methodology should include an outline of the consultant's proposed evaluation framework that addresses each of study objectives described in sub-section 2.2 of this RFP.
e) A chart showing the project timeframe and budget for each phase. The budget should include a breakdown of time and costs for each consultant assigned to the project.
f) A brief summary of the role of each consultant assigned to the project.
g) A statement indicating that the Respondent does not and will not have a known conflict of interest (actual or potential) if selected to undertake the assignment.
h) The names and phone numbers of three references for whom the consultant has recently undertaken assignments of a similar scope and nature, including the name of each organization and the title of the project undertaken for the named reference.
i) Resumes of consultants assigned to work on the project.

Respondents are requested to provide information in their proposal in as brief and as concise a manner as possible, and to limit their proposal (excluding any appendices) to a maximum of 15 pages.

8.2 Proposal Submission and Tender Closing

Respondents must submit ***one copy of their proposal signed*** by an individual in their organization authorized to do so, and ***three additional copies of their proposal*** to the Trust. The Trust will not accept or consider proposals transmitted by facsimile, e-mail, or sent by other electronic means.

Proposals must be received by the Living Legacy Trust by ***5:00pm Eastern Time, on Monday, October 27th, 2003***, at the following address:

Living Legacy Trust,
Suite 704, 45 Charles Street East,
Toronto, Ontario M4Y 1S2

Reference: Evaluation Proposal

Living Legacy Trust shall reject and return unopened to the sender any proposal that is not received at the Trust office by the time and date noted above.

8.3 Questions and Answers Prior to the Tender Closing Date

A ***voluntary bidders' meeting*** will be held at the office of the Living Legacy Trust (address noted above) at ***10:00am Eastern Time, on Wednesday, October 15th, 2003***. Organizations interested in attending the meeting in person or by teleconference are requested to fax the Trust (fax number 416-964-5900) in advance of the meeting to confirm their attendance and to obtain teleconference details. Organizations are requested to limit to two, the number of representatives they send to the bidders' meeting.

Requests for additional information or clarification regarding this RFP may be faxed by Respondents prior to ***5:00pm Eastern Time, on Friday, October 17th, 2003*** to Ms. Karan Aquino, at the Trust at the fax number noted in the previous paragraph. Questions will be responded to by the Trust by return fax.

9.0 Proposal Review and Award Process

Each proposal received by the Trust by the tender closing date and time specified above will be evaluated by senior Trust staff and Board members utilizing a pre-set marking scheme. The following evaluation criteria will be considered during the proposal review:

- Consultant's level of understanding of the assignment overall.
- Extent to which the proposed methodology, work plan and deliverables meet the purpose and objectives of the project.
- Consistency between the consultant's proposed timeframe, budget and work plan, with the Trust's stated requirements.
- Level and scope of consultant's qualifications and experience in undertaking projects of a similar size and nature.
- Suitability of consultant's skills and experience in undertaking various aspects of the project.
- Level and scope of consultant's knowledge and understanding of the areas covered in section 2.0 of this RFP.

Following the proposal review, individual Respondents may be invited to attend an interview with Trust staff and Steering Committee members on or about Monday, November 3rd, 2003 to clarify the contents of their proposal. In addition, named references may be contacted by the Trust to obtain information regarding submitting organizations and/or consultants assigned to the project.

Neither the proposal with the lowest cost nor any proposal will necessarily be accepted.

Each Respondent will be notified of the results of the RFP in writing.

Living Legacy Trust anticipates that the selection of the consultant will be made on or about November 10th, 2003. The successful Respondent can expect to begin work on the project approximately November 17th, 2003.

APPENDIX

Stated Objectives (and Targeted Allocation) for Each of the Trust's Nine Funding Programs

A. Improved Forest Management

1. Loss of use of roads & bridges ($1M)

To provide compensation to eligible forest industry applicants for loss of the use of capital investments in permanent infrastructure directly related to regulated land withdrawals resulting from the recent Lands for Life land use decisions (e.g., roads and bridges).

2. Multi-purpose access roads ($5M)

To provide funds to eligible applicants for improvements to multi-purpose resource access roads on Crown lands due to changes in resources uses and the movement of resource users and products resulting from the recent Lands for Life land use decisions.

3. Far North forestry development ($3M)

To provide funds to eligible applicants for strategic data collection planning projects and/or environmental assessment work which will support resource allocation decisions of access to commercial forests and to identify new protected areas north of the current licensed Forest Management Units focusing on forests that are in the vicinity of Pikangikum First Nation and Moose Cree First Nations and that directly involve and provide direct economic benefit to First Nations communities.

4. Forest science data collection and research ($7M)

To provide funds to eligible applicants for data collection and research (including operational trials) in support of projects designed to promote the increased utilization of Crown timber and to support projects to enhance tree improvement science, produce more accurate growth and yield information and investigate intensive silviculture practices. Applicants must outline and commit to investing matching dollars and/or in-kind contributions to the approved projects.

5. Forest employment opportunities ($5M)

To provide funds to eligible applicants to initiate projects that will increase the quality and quantity of Crown wood (e.g. thinning, vegetation management, tree improvement) through the hiring of new forestry workers, focusing on youth employment where possible. Total disbursements to be approximately $5,000,000 with a maximum of $20,000 per new worker when companies agree to hire, supervise and support the position for at least one year.

6. Value-added wood manufacturing ($0.5M)

To provide funds to eligible applicant(s) to initiate project(s) that increase strategic information on value-added manufacturing of wood projects by undertaking a market and sector study to:

i) benchmark Ontario's solid wood value-added sector;

ii) define the destination of Ontario's solid wood shipments, and
iii) define the opportunities for specific projects or end uses for value-added manufacturing growth.

B. Improved Fish and Wildlife Management

7. Scientific data on fish and wildlife ($3.5M)

To provide funds to eligible applicants in the collection of scientific data relating to fish and wildlife habitats and population linkages and thereby facilitate better resource management practices.

8. Ecological approach to fish and wildlife management ($2M)

To provide funds to eligible applications to support an ecological approach to fish and wildlife management through such methods as data collection, identification of gaps in science, development of analytical tools and provisions of science-based directions and guidelines.

9. Benefiting northern communities through fish and wildlife resources ($1.5M)

To provide funds to eligible applicants for projects that will benefit small, rural communities by improving access to fish and wildlife resources and by improving habitats. Funding from the Trust must be matched by local contributions at a ratio of two to one.